

Amended Telefile Worksheet 2002

1

Your Social Security number _____ Spouse's Social Security number _____

Your "Total tax for 2002" (from line 12 of your Telefile worksheet) \$ _____

1 Correct filing status: ☐ Single (from head of household) ☐ Head of household (from single)

2 ☐ Correct number of dependents (do not include yourself or spouse)

Social Security number(s) of dependent(s) (up to nine dependents allowed) _____

☐ Number of dependent member(s) of household under age 12, or dependents age 65 or over (not you or your spouse) as of 12/31/02, or disabled dependent(s). Not more than two.

W-2 Information (wages only)

3 Total number of Forms W-2 ☐ for you ☐ for your spouse. **Note:** Total number of Forms W-2 cannot exceed five.

4 Enter the **Employer Identification number** for each Form W-2 (generally box b)

5 Enter the total of **State wages/tips** (generally box 16) and **Allocated Tips** (generally box 8) for each Form W-2

6 Enter **your** total amount paid to **Soc. Sec., U.S., RR. or Mass. retirement** plus **Medicare** for each Form W-2 (generally boxes 4 & 6)

7 Enter **spouse's** total amount paid to **Soc. Sec., U.S., RR. or Mass. retirement** plus **Medicare** for each Form W-2 (generally boxes 4 & 6)

8 Enter the total of **Massachusetts income tax withheld** (generally box 17) for each Form W-2

| | 5 | 6 | 7 | 8 |
|---------|---|---|---|---|
| 1st W-2 | | | | |
| 2nd W-2 | | | | |
| 3rd W-2 | | | | |
| 4th W-2 | | | | |
| 5th W-2 | | | | |

Amended Telefile will provide the amounts that should be entered in the shaded boxes.

\$ _____ \$ _____ \$ _____ \$ _____

5. TOTAL of above **6. TOTAL of above** **7. TOTAL of above** **8. TOTAL of above**

\$ _____ \$ _____ \$ _____ \$ _____

5. Amount of difference **6. Amount of difference** **7. Amount of difference** **8. Amount of difference**

9 **Unemployment compensation.** Additional amount. \$ _____ **Corrected total** 9 \$ _____

a. Massachusetts withholding. Additional amount. \$ _____ **Corrected total** 9a \$ _____

10 **Massachusetts bank interest.**
Amount of increase/decrease \$ _____ **Corrected total** 10 \$ _____

11 **Winnings and Fees.** Additional amount. \$ _____ **Corrected total** 11 \$ _____

a. Massachusetts withholding. Additional amount. \$ _____ **Corrected total** 11a \$ _____

12 **Amount of rent** you paid in 2002 \$ _____ **Corrected total** 12 \$ _____

Landlord's name and address: _____

13 **Earned Income Credit (EIC).** Number of qualifying children. ☐ Enter EIC amount from U.S. return 13 \$ _____

Social Security number(s) of qualifying children _____

14 **Student Loan Interest Deduction.** Enter the amount from U.S. Form 1040A, line 18 or U.S. Form 1040, line 25 (not to exceed \$2,500 for tax year 2002). 14 \$ _____

STOP! Be sure to complete page 2 on reverse.

15 Taxable pensions and annuities (from U.S. 1040A, line 12b; or 1040, line 16b). Enter total in line 15c. If any of these distributions include previously-taxed contributions, make the necessary adjustment by completing lines 15a, 15b and 15c:

a. Total pensions and annuities (from U.S. 1040A, line 12a; or 1040, line 16a) . . . 15a \$ _____

b. Contributions previously taxed by Massachusetts included in line 15a 15b \$ _____

c. Taxable pensions and annuities. Subtract item b
from item a and enter result. 15c \$ _____ **Corrected total** 15c \$ _____

d. Total Massachusetts withholding for pensions and
annuities (from box 10 of all Forms 1099-R) . . . 15d \$ _____ **Corrected total** 15d \$ _____

Do not include in line 15c any contributory pensions from the U.S. government, the Commonwealth of Massachusetts or its political subdivisions, or any noncontributory pensions or survivorship benefits from the U.S. uniformed services (Army, Navy, Marine Corps, Air Force, Coast Guard, commissioned corps of the Public Health Services and National Oceanic and Atmospheric Administration).

After completing this worksheet, call (617) 660-2033.

16 Amended tax for 2002 16 \$ _____

17 Amended amount of your refund 17 \$ _____

18 Amended amount of tax due 18 \$ _____

Pay by credit or check card. See instructions for more information. Enter authorization number _____

“Sign” your return. You (and your spouse, if filing jointly) must be present to authenticate the filing of your return. Amended Telefile will assign you a 9-digit confirmation number. Do not hang up until you receive this number; it is your proof of filing.

Confirmation number _____ Date of amended filing ____/____/____

Filing an Amended Telefile Worksheet

You should file an Amended Telefile Worksheet if you meet any of the following criteria:

- If you wish to claim the Earned Income Credit and you did not previously claim this credit on Telefile;
- If you wish to claim the Student Loan Interest Deduction and you did not previously take this deduction on Telefile;
- You are amending your filing status only to single (from head of household) or to head of household (from single);
- You are amending the number of dependents claimed;
- Your income that is being amended comes from one or more of the following sources **only** — wages and/or tips reported on Form W-2, unemployment compensation, Massachusetts bank interest, winnings and fees, and pensions and annuities;
- You are reporting only **additional** and/or **corrected** W-2 information, such as wages, tips, state withholding and Social Security withholding as reported on Form(s) W-2, W-2C or 1099-G, or **additional** unemployment compensation or winnings and fee income as reported on Form(s) 1099, 1099-G or 1099-MISC, or pensions and annuities as reported on Form 1099-R;
- You are increasing or decreasing the amount of Massachusetts bank interest or the amount of rent paid **only**;
- You are amending the dependent member under age 12 or dependents age 65 or over (not you or your spouse) as of 12/31/02, or disabled dependent(s) deduction;
- You would like to add or change pensions and annuities (from U.S. 1040A, line 12b; or 1040, line 16b); and
- The total number of Form(s) W-2 reported between Telefile and Amended Telefile does not exceed five.

If you do not meet the above criteria for filing an Amended Telefile Worksheet, you must file a Form CA-6, Application for Abatement/Amended Return. This form is available by visiting www.mass.gov/dor; or by calling the Customer Service Bureau at (617) 887-MDOR.

Step-By-Step Instructions

Enter your Social Security number, and your spouse's (if married filing jointly) and the amount of "Total tax for 2002" from line 12 of your original 2002 Telefile Worksheet. **Amended Telefile will provide corrected amounts for lines 5 through 12, 15, 16 through 18. These amounts should be entered in the shaded boxes.**

Line 1. If you are changing your filing status, check the appropriate box.

Line 2. Enter the correct number of dependents (do not include yourself or spouse). You will be asked if any dependent members of household were under age 12 or age 65 or over (not you or your spouse) as of 12/31/02, or disabled dependents. In the spaces provided, enter the Social Security number(s) of any additional dependent(s).

Line 5. Enter on the lines in column 5 the amount of wages/tips from **all** Form(s) W-2.

Lines 6 and 7. Enter on the lines in column 6 for yourself, and in column 7 for your spouse, the amount paid to Soc.Sec., U.S., R.R. or Massachusetts retirement **plus** Medicare from **all** Form(s) W-2.

Line 8. Enter on the lines in column 8 the amount of Massachusetts Income Tax withheld from **all** Form(s) W-2.

Add the amounts down the columns in **lines 5** through **8** and enter these totals in the appropriate white boxes. These are the amounts you will need when you make your call.

Line 9. Enter the amount of additional unemployment compensation received from Form(s) 1099-G.

Line 9a. Enter the amount of additional Massachusetts withholding from Form(s) 1099-G.

Line 10. Enter the amount of increase or decrease of Massachusetts bank interest from all Form(s) 1099.

Line 11. Enter the amount of additional winnings/fee income from all Form(s) W-2G, 1099 and/or 1099-MISC.

Line 11a. Enter the amount of additional Massachusetts withholding from all Form(s) W-2G, 1099 and/or 1099-MISC.

Line 12. Enter the correct amount of rent paid in 2002.

Line 13. Enter the number of qualifying children, if any, and then enter the federal Earned Income Credit amount from your U.S. Form 1040, line 64; 1040A, line 41; 1040EZ, line 8; or U.S. Telefile Tax Record, item L.

Line 14. Enter the amount of Student Loan Interest Deduction from U.S. Form 1040A, line 18 or U.S. Form 1040, line 25. This amount may not exceed \$2,500 for tax year 2002.

Line 15. Enter amount of taxable pensions and annuities from U.S Form 1040A, line 12b; or 1040 line 16b (see Amended Telefile Worksheet).

Lines 16 through 18. Amended Telefile will automatically compute the correct tax amount for 2002, as well as the additional amount of your refund or amount you owe. These amounts should be entered in the shaded boxes.

TaxTalk

TaxTalk is DOR's automated system of recorded tax information available by calling during non-business hours (617) 887-MDOR or toll-free in Massachusetts 1-800-392-6089. TaxTalk topics are also available through DOR's Fax on Demand system or via DOR's website at www.mass.gov/dor. For a menu of TaxTalk topics available on Fax on Demand, please call (617) 887-1900 using the handset and keypad on your fax machine and, when prompted, enter document retrieval number 4000. To access the TaxTalk topics through DOR's website, click on "Help/Resources." TaxTalk includes information on what's new for tax year 2002 as well as answers to commonly asked questions concerning personal income tax, sales and use tax, meals tax, withholding tax, room occupancy excise, sales tax on motor vehicles, corporate excise, partnerships, estate tax, and your rights as a taxpayer.

Credit or Check Card Payment

If Amended Telefile determines that you owe tax, you have the option of paying this amount with your MasterCard, Visa, Discover or Novus brand card. To do so, you will be required to enter your account number and the four-digit expiration date (month and year) after authenticating your return. You should have your credit or check card information readily available.

Note: You can pay with your MasterCard, Visa, Discover or Novus brand card only during your Amended Telefile call. The appropriate amount will be credited to your Department of Revenue account on the next business day.

If You Need to Send a Payment

Complete the Amended Telefile Payment Voucher by including the following information:

1. Your name, and spouse's name if filing a joint return, and address;
2. Your Social Security number, and spouse's Social Security number if filing a joint return; and
3. The amount of the enclosed payment.

Mail to: Massachusetts Department of Revenue, PO Box 7062, Boston, MA 02204-7062.

If you do not make full payment of the tax due on or before April 15, 2003, you will be sent a Notice of Assessment (NOA). This notice will show your tax due, plus any interest and penalty assessments for late payment.

DETACH HERE

Amended Telefile Payment Voucher 2002

Massachusetts Department of Revenue

| | | | |
|---------------------|-----------------|-----------|---------------------------------|
| First name | M.I. | Last name | Social Security number |
| Spouse's first name | M.I. | Last name | Spouse's Social Security number |
| Street address | Amount enclosed | | |
| City/Town | State | Zip | |

STAPLE CHECK HERE

DETACH HERE

